

SPANISH ROBOTIC PROCESS AUTOMATION (RPA) MARKET ANALYSIS

Market Research - March 2026

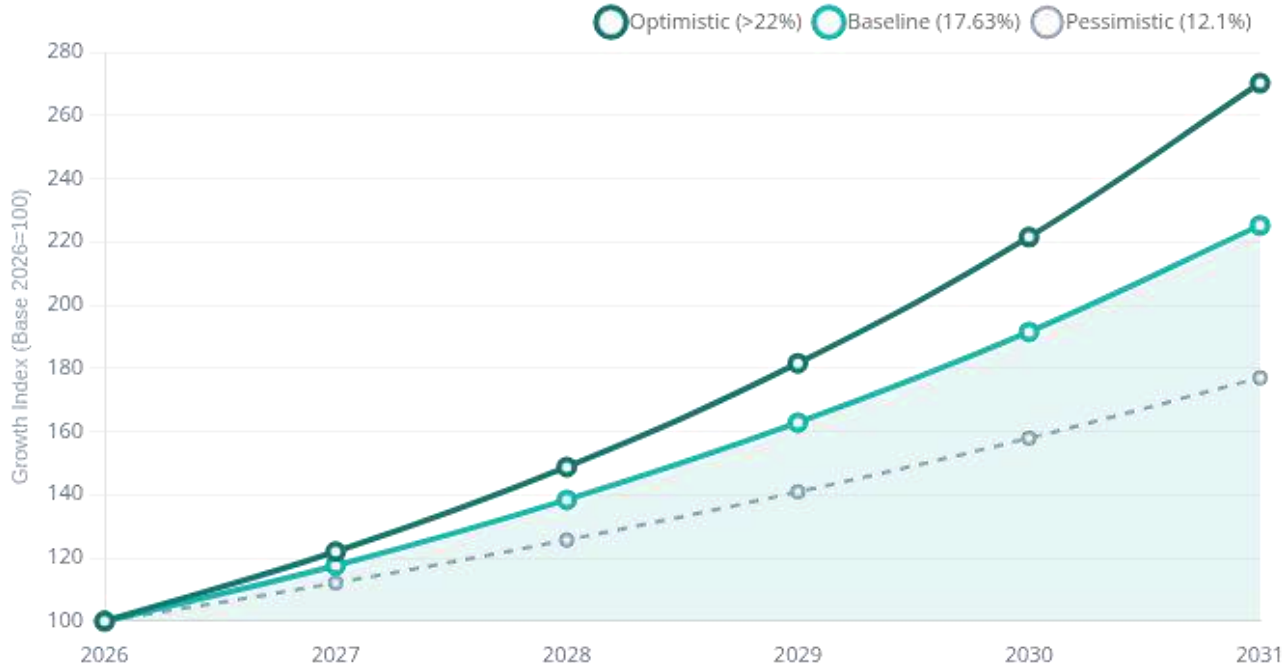
Now, for tomorrow



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Market Size & Growth

Growth Scenarios: Optimistic vs Baseline vs Pessimistic



Spain Digital Transformation Market

\$41.62B

Total addressable market for 2025, embedding RPA within broader IT spend.

Digital Transformation

17.63% CAGR

Spain (2026-2031) - Driven by cloud migration & Kit Digital



Global RPA Software

30.04% CAGR

Global (2024-2035) - Shift to Hyperautomation



Intelligent Doc Proc (IDP)

35.4% CAGR

Global (2025-2033) - Critical for unstructured data



Industrial Robotics

12.1% CAGR

Spain (2025-2030) - Manufacturing modernization



Key Market Drivers and Trends



Regulatory

Ley Crea y Crece

Mandatory B2B e-invoicing implementation driving automation of AP/AR workflows across all enterprise tiers.

SII & VeriFactu

Fiscal traceability requirements expanding by 2027, necessitating real-time reporting bots and compliance automation.

EU AI Act (2026)

New governance framework requiring transparency for AI-driven automation, pushing for "explainable" bot architectures.



Technology

Agentic AI

Shift from rule-based scripts to autonomous agents capable of decision-making and handling unstructured data.

BOAT Integration

Business Orchestration and Automation Technologies combining RPA, IDP, and Process Mining into unified stacks.

RPAaaS & Cloud-Native

Rapid adoption of SaaS-based delivery models and cloud-native bots, lowering infrastructure barriers.



Economics

ICT Talent Gap

Chronic shortage of specialized labor accelerating adoption of low-code platforms and citizen development models.

Operational Costs

High energy prices and wage inflation driving demand for automation to protect margins in industrial sectors.

ROI Velocity

Market demanding rapid payback periods (<12 months), favoring modular and outcome-based automation projects.

End-User Profiles and Criticality

Segment	Market Share	Criticality Driver	Core Problems	Example Use Cases
 BFSI	30-36%	Regulatory & Legacy Debt	System fragmentation, DORA/AML compliance risks, high volume reconciliations.	KYC validation, Mortgage processing, Floor clause re-liquidations.
 Manufacturing	15-18%	Competitive Productivity	Supply chain latency, high energy/labor costs, IT/OT convergence gaps.	Supply chain orchestration, Zero-touch invoicing, Inventory mgmt.
 Public Sector	12-15%	Legal Timelines/Backlog	High-volume procedural delays, citizen service bottlenecks, "click-heavy" admin.	Grant processing (Kit Digital), Nationality applications, Judicial records.
 Energy & Utilities	10-12%	Operational Margin	Smart meter data overload, predictive maintenance needs, price volatility.	Meter reading reconciliation, Maintenance scheduling, Carbon reporting.
 SMEs	8-10%	Growth Scalability	Resource constraints, manual accounting burden, e-commerce scale limits.	E-commerce listing mgmt, Basic invoicing, Customer service chatbots.

Contact us



Diego Gutiérrez Zarza

Corporate Finance Partner
dgutierrez@bakertilly.es



Cristina Salmón

Head of Tech Sellside
cristina.salmon@bakertilly.es

www.techma.bakertilly.es

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